FIDUCIENT ADVISORS

Retirement Planning Success Story

A couple's retirement planning journey demonstrates the power of a proactive financial strategy. With the guidance of Fiducient Advisors' financial advisors, they turned their financial anxiety into confidence, enabling them to retire on the same day and embrace a future full of financial clarity and purpose.

Client Profile

A mid-60s couple, with successful careers - husband as a hospital executive and wife as a teacher - values family travel, community involvement and desires to ensure their financial security. With a net worth in the high six to low seven figures, they aim to preserve and grow their wealth for a comfortable retirement lifestyle and to provide for future generations.

Objectives & Challenges

- Secure financial stability throughout retirement, preserve assets for future generations and ensure the plan supports long-term goals and unexpected opportunities.
- Plan a seamless retirement transition for both spouses, aligning career timelines for a joint retirement date.
- Conduct scenario modeling to stress-test the financial plan against market fluctuations, spending assumptions, and other variables.
- Prepare clients emotionally and financially for retirement uncertainties.

Solutions We Provided

Comprehensive Financial Analysis

- Modeled portfolio returns and spending scenarios.
- Assessed risks like market downturns and healthcare costs.
- Identified opportunities to help maximize retirement income.

Confidence Building Retirement Strategy

- Helped ensure a high probability of retirement success.
- Helped client feel secure in avoiding outliving assets while leaving a legacy.

Post Retirement Planning

- Backed husband's contract work decision, improving their financial outlook.
- Ongoing monitoring and adjustments to the financial plan.

Long-Term Impact

The couple marked a sentimental retirement by choosing her last day of school as the date. Soon after, they fulfilled a dream by taking their family on an Alaskan cruise.

Seamless Transition:
The couple celebrated a sentimental retirement choosing the wife's last school day to begin a dream Alaskan cruise with family.

Securing the Future Together:
The husband used his expertise in work that bolstered their financial security but plans to join his wife in full retirement soon.

Empowering Confident Retirements:
The couple's success story highlights our firm's ability to go beyond investment management to offer truly comprehensive financial planning, giving clients the confidence to enjoy a fulfilling retirement and navigate life's uncertainties

Ready to strengthen your financial future and enjoy a secure retirement?

Contact Fiducient Advisors.

Contact Us

800.260.5445

www.FiducientAdvisors.com